

Position and Union Setups

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Synopsis:

The 'Position and Union Setups' section includes the 'Pay Matrix' and 'Advanced OT Setup'. You will use the features in this section when its necessary to configure differential earnings rates based on union affiliation / position as well as configuring unique overtime requirements that can not be met by the basic OT multiplier function.

This manual will define and walk through the different aspects of the 'Position and Union Setups' section.

TABLE OF CONTENTS

- **ACCESS POSITION AND UNION SETUPS**
- **PAY MATRIX CODES**
- **PAY MATRIX**
- **POSITION CODES**
- **POSITION DEPARTMENT CODES**
- **POSITION CATEGORY CODES**
- **UNION CODES**
- **ADVANCED OT SETUP**
- **VALIDATION PRIORITY**

ACCESS POSITION AND UNION SETUPS

- Full Payroll Menu
- Setup Groups Column
- Position and Union Setups

Full Payroll Menu

Payroll Processing	Reports	History	Periodic Activities	Setup	Setup Groups	Posting Setup
Payroll Employees	Payroll Report	Posted Payroll	Periodic Processing..	Payroll Setup	Additional Setups..	Employee Posting Groups
Payroll Processing	US Tax Reports..	Payroll Ledger Entries	Financial Periodic Activities..	Payroll Codes	HR Setup..	Earnings
Batch Payroll Processing	Payroll Financial Reports..	Payroll Statistics	ACA Compliance..	Pay Cycles..	Report Setup..	Withholdings / Deductions
Payroll Applicants	Payroll Employee Info..	Posted Batch List	Web Portal Documents..	Payroll Calc. Formulas	Process Procedures..	Employer Taxes
Payroll Journal	HR Reports..	PTO Ledger Entries	Create Emp. Info. from Template..	Earnings Rates	Payroll Division Templates..	Employer Contributions
PTO Management..	Field Select Reports..	Hours Detail Entries	Time Transfer Reports..	Payroll Tax Setup	Applicant Setup..	Reimbursements
Enter Hours / Quantity..	Time / PTO Reports..	Approved PTO Hours	Labor Cost Updates..	Customer Payroll Tax Setup	Position and Union Setup..	Payment Advances
Emp. Change Req./Approve..	Labor Costing Information..	Other Ledgers..	Automatic Data Migration..	State Tax IDs	Pay Matrix Codes Pay Matrix Position Codes Position Department Codes Position Category Codes Union Codes Advanced OT Setup Validation Priority	

PAY MATRIX CODES

From here you can set up 'Pay Matrix Codes' which can be applied to a unique Pay Matrix setup. The Pay Matrix setup will then determine what rates to apply to an employee's hours based on the criteria in the Pay Matrix.

To create 'Pay Matrix Codes' simply select a line and enter the desired code:

← PAY MATRIX CODES ✓ SAVED

Search + New Edit List Delete Page

Code 1	Description
→ MATRIX	Matrix
UAW	United Auto Workers

PAY MATRIX

Please see 'Pay Matrix Setup' which is a sub category of this manual

POSITION CODES

When setting up 'Position Codes' its helpful to already create, 'Position Department Codes', 'Position Category Codes' and 'Union Codes'. Once you have these codes setup you can create 'Position Codes'. The main purpose of 'Position Codes' is to provide a broad range of criteria that can be applied to positions in order to setup unique reporting and / or pay matrix requirements.

Open 'Position Codes' and click the 'New' page action. From here you can create a 'Code' and apply all the necessary criteria for this position code including, position category, position department, union code, payroll location code, default state along with any payroll dimension that should be applied to this position:

 POSITION CODES    ✓ SAVED  

FLOOR MANAGER

General

Code	FLOOR MANAGER	Reporting Code	
Description		Populate UDFs from P...	☒

US Fields

Default Workers Com...		Default EEO Code	
Workers Comp. Descri...			

Position Groups

Default Position Cate...	MANAGER	Default Union Code ...	UAW
Default Position Depa...	ADMIN		

Payroll Location / State

Payroll Location Code ...		Default State	
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Payroll Dimensions

Department Code		State Code	
Job Code			

POSITION DEPARTMENT CODES

From here you can create your Position Department Codes as needed:

← POSITION DEPARTMENTS

✓ SAVED 🔖 📄 ✎

🔍 Search ➕ New 🔧 Edit List 🗑️ Delete Page 🔼 ☰

Code ↑	Description
→ ADMIN	Administration

POSITION CATEGORY CODES

From here you can create Position Category Codes

← POSITION CATEGORIES

✓ SAVED 🔖 📄 ✎

🔍 Search ➕ New 🔧 Edit List 🗑️ Delete Page 🔼 ☰

Code ↑	Description
→ MANAGER	Manager

UNION CODES

From here you can create your Union Codes

← UNION CODES

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🔍 Search ➕ New 🔧 Edit List 🗑️ Delete Page 🔼 ☰

Code ↑	Description
→ UAW	United Auto Workers

ADVANCED OT SETUP

Please see 'Advanced OT Setup Manual'. It's a sub category of this manual

VALIDATION PRIORITY

The 'Validation Priority' allows you to set up a priority card that can tell the system to input all the information on the card into the time entry section if certain criteria are met. You can set a 'Type' based on Job, Job Task, Position or Payroll Dimension.

The 'Validation Priority' is basically a way to make the parameters correct when you are entering hours detail with a complex setup

When you open 'Validation Priority' click 'New' to create a new Validation Priority Card.

Then you can set the criteria and the priority of the card.



VALIDATION PRIORITY CARD



✓ SAVED



Job · J00010

General

Type	Job ▼	State	CA ▼
Code	J00010 ...	Validation Priority	1
Job Code Task	▼	Enabled	☒

Position / Union

Position Code	FLOOR MANAGER ▼	Position Category	MANAGER ▼
Union Code	UAW ▼	Position Department	ADMIN ▼

Job / Task

Job	J00010	Job Task	
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Dimension Codes

Payroll Dimension 1 C...	...	Payroll Dimension 3 C...	...
Payroll Dimension 2 C...	...	Payroll Dimension 4 C...	...